

Training Needs of DoD Personnel in Marking Technical Information for Distribution

**Results of a Survey Conducted for the DoD
Office of Scientific and Technical Information Policy
by Oak Ridge Institute for Science and Education (ORISE)**

October 1996



The Survey Addressed Two Questions:

- What problems were DoD personnel having interpreting and applying the requirements of DoD Directive 5230.24?
- What kinds of resources might help them better understand and apply the policies on distribution statements?



How Were Data Gathered?

- Telephone surveys of about 75 personnel in all three services.
- Informal discussion with personnel at meetings and training sessions.



What Did We Learn from the Assessment?

- Not surprisingly, the assignment of roles and responsibilities for distribution statements varies widely among organizations.
- Division of responsibility between the “Controlling Office” and the performer of the work was not always clear.
- The presence of contractors in research and other roles also added uncertainty as to who should be making distribution decisions.



What Misunderstandings Did Respondents Report?

- Lack of familiarity with the policies that require distribution statements.
- Lack of understanding of the reasons for the policies.
- Uncertainties about what *is* scientific and technical information and what *is not*.



What Misunderstandings Did Respondents Report? (continued)

- Difficulty in balancing the need for restrictions against the need for dissemination.
- Export control, export control, export control



What Practical Problems Did Respondents Report?

- “Role- and organization-specific” preferences for particular distribution levels (“We always use B”).
- Avoidance of distribution statements by using “informal” communication.
- Simple failure to mark documents.

What Practical Problems Did Respondents Report? (continued)

- Failure to mark classified documents
- Problems in assigning a distribution statement years after a document was created (e.g., during declassification).
- Dealing with requests for exceptions.



Institutional and Personnel Issues

- Infrequent performance of the tasks of assigning distribution statements.
- Staff turnover.
- Reorganization, downsizing, and outsourcing--all of which have led to loss of institutional memory.



What Resources Did Respondents Report Needing?

- About 20% reported needing no additional help.
- The remainder were interested in:
 - some training
 - job aids (computer *and* paper)
 - online resources (e.g., FAQs)



Marking DoD Technical Documents for Distribution

How to Overcome Information Anxiety... about DoD Distribution Statements



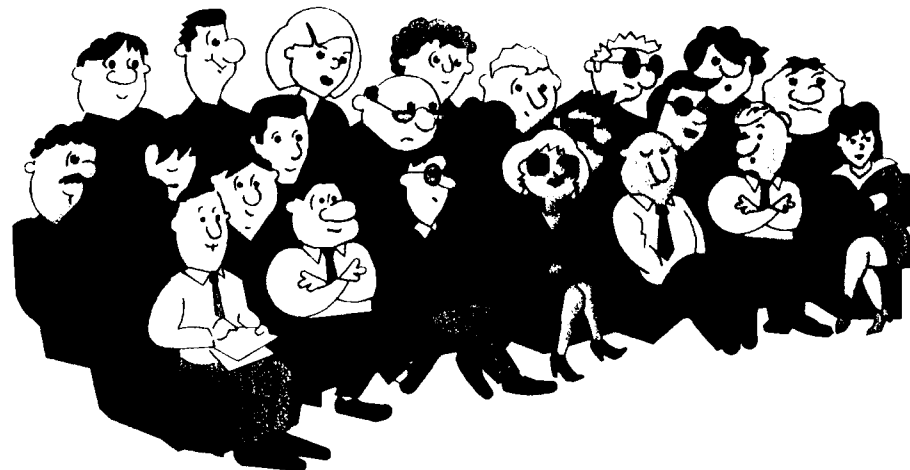
Offered by the
Office of Scientific and Technical Information Policy
U.S. Department of Defense

Getting Started and Getting Motivated

Marketing DoD Technical Documents for Distribution

Target Audience

- Scientists and engineers
- Technical support staff and technicians
- Security personnel
- Public affairs staff
- Foreign disclosure personnel
- Technical data managers
- Scientific and technical information managers
- Library and repository staff



I. Getting Started and Getting Motivated

Marking DoD Technical Documents for Distribution

By the End of This Course, You Should:

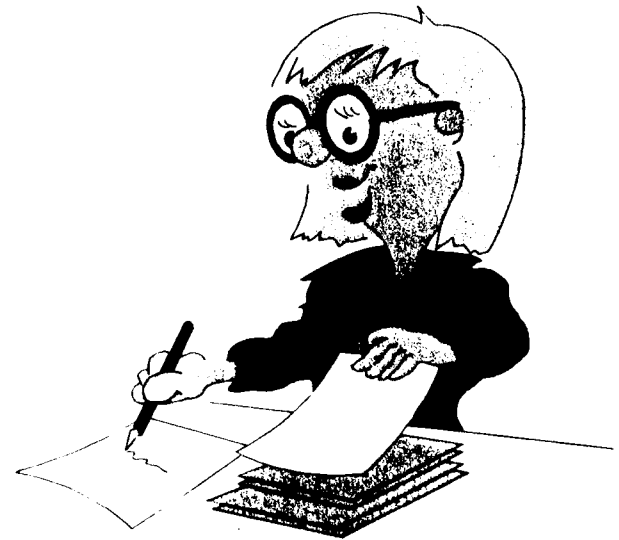
- Understand the principles of DoD policy guiding decisions on Distribution Statements; and specifically, which issues are important given the materials you routinely handle.
- Recognize the variables you must consider with each document, drawing, data set, or other body of information, and some of the complexities you may encounter.
- Be able to demonstrate the process for (correctly!) assigning Distribution Statements to DoD technical documents with the help of materials and job aids you will take home from this session.

I. Getting Started and Getting Motivated

Marking DoD Technical Documents for Distribution

Course Objective

- To provide a basic understanding of DoD policies and the major issues, merits, rationale, and mechanics of properly assigning Distribution Statements to DoD technical documents.



I. Getting Started and Getting Motivated

Marking DoD Technical Documents for Distribution

Module Objective

- Participants will be able to describe the purpose and benefits of DoD's policy on marking and distributing DoD technical documents, information, and data.

Marking DoD Technical Documents for Distribution

- What is the DoD policy for marking DoD technical documents?
- What is the balance between the need to control the distribution of DoD technical documents and the benefits of widely disseminating DoD technical documents?



I. Getting Started and Getting Motivated

Marking DoD Technical Documents for Distribution



II. Why Are Distribution Statements Needed?

Marking DoD Technical Documents for Distribution

Questions To Answer

- What types of technical documents are governed by DoDD 5230.24?
- What types of technical documents are not governed by DoDD 5230.24?
- What do I do with documents that are not technical but contain a small amount of technical information and data?
- Do I have to mark information if it is already marked classified, export-controlled, or proprietary?

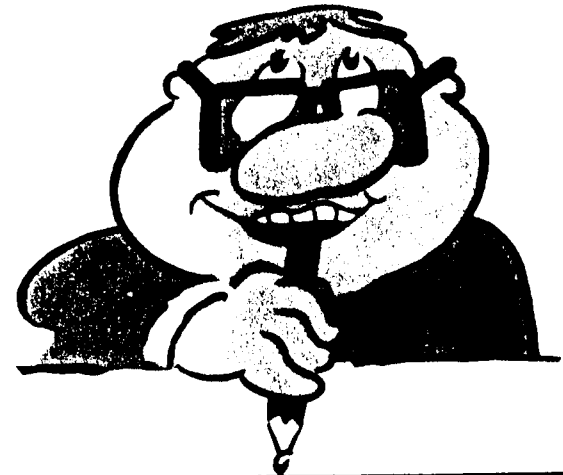


II. Why Are Distribution Statements Needed?

Marking DoD Technical Documents for Distribution

Objective

- The participant will be able to identify the roles and responsibilities associated with marking of DoD technical documents, information, and data for distribution.



III. Who Are You? Roles and Responsibilities

Marking DoD Technical Documents for Distribution

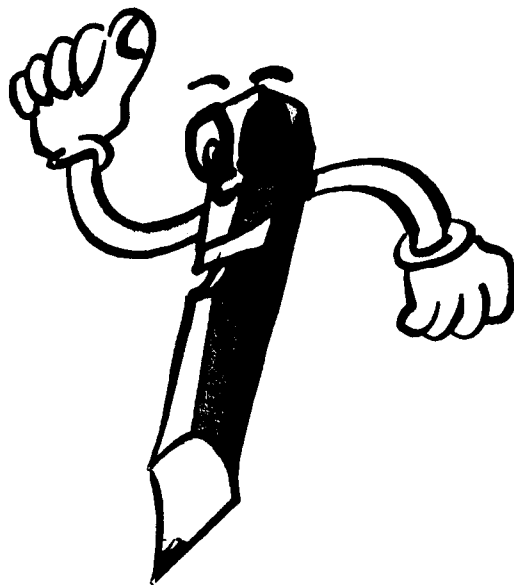
Questions to Answer

- What are the responsibilities of the Controlling Office?
- What are the issues associated with group sponsorship?
- What are my responsibilities for marking information?



III. Who Are You? Roles and Responsibilities

Marking DoD Technical Documents for Distribution



IV. Assigning Distribution Statements

Marking DoD Technical Documents for Distribution

Objective

Using the job aids provided, the participant will be able to:

- correctly assign DoD Distribution Statements to technical documents
- place DoD Distribution Statements in the appropriate location on different types of media



IV. Assigning Distribution Statements

Marking DoD Technical Documents for Distribution

Questions To Answer

- How do I select the most appropriate DoD Distribution Statement?
- What formats and media can technical information be found?
- Where does the DoD Distribution Statement go on printed documents, magnetic data, microfiche, drawings, photographs, viewgraphs, oral presentations and audiovisual productions?



IV. Assigning Distribution Statements